Senior Leader Business Strategy Cohort:

Strategy to Execution: Operating Rhythm for Leadership Teams

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Thank you!

Senior Leader Business Strategy Sessions

- **Strategy to Execution: Operating Rhythm for Leadership Teams**
Peter Baron, Founder, MoonshotOS, February 12 2026

- **Alternative Revenue That Actually Moves the Needle**
Karen McClelland, Executive Director of Auxiliary Programs, Sidwell Friends; Senior Strategist, SPARC, March 12, 2026

- **Enrollment Engine: Marketing, Yield, and Retention**,
Brendan Schneider, CEO, SchneiderB Media, April 14, 2026

- **Advancement as a Strategic Growth Driver**
Mattingly Messina, Founder, Throughline, May 5, 2026

- **Translating School Finance: What Every Leader Needs to Understand**
David Hanson, CFOO, The Branson School; Managing Partner, Winthrop & Associates, June 11, 2026
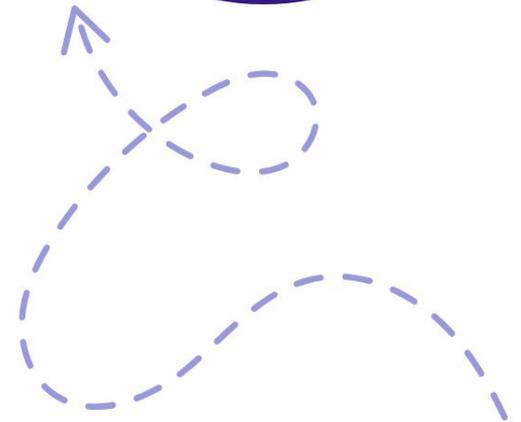
Agenda

Part One: About Me

Part Two: What I've Learned from 150 Heads of School
                   & the Business Model Pressures Amplifying the
                   Importance of Strategy

Part Three: Rising to the Level of Our Systems

Part Four: How a School Operating System Drives
                   Strategic Execution

Part Five: Q&A

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Outcomes for Today

By the end of today, you'll walk away with three things:

- An overview of a structured system called the **School Operating System**.

- **Learn a weekly leadership meeting structure** that has been proven to work by thousands of organizations around the world to keep teams aligned and executing with focus.

- Understand how **prioritization builds strong an high-functioning teams**.
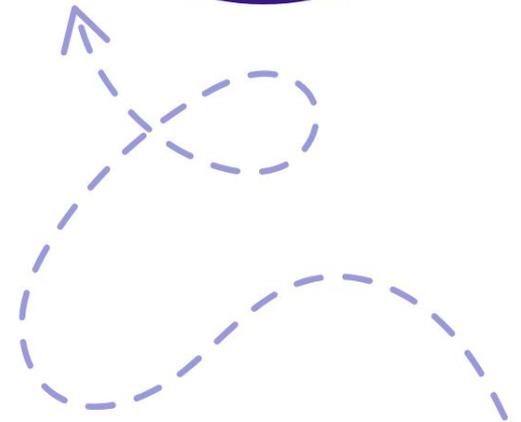
Hi, I'm Peter Baron

Boarding school graduate and Certified Top Coach™ by Top Teams—the methodology behind the School Operating System (SOS).

Spent the past 20+ years as an association leader, board member, and **passionate champion for independent schools with one goal: to help you and your school succeed.**

Helped thousands of independent school leaders with enrollment, marketing, professional development, hands-on training, information management, and more.

My interviews with over 100 Heads of School has shown me the power of systems thinking.

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Organizations where I worked to support independent schools like yours.

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Enrollment Management Association

blackbaud®
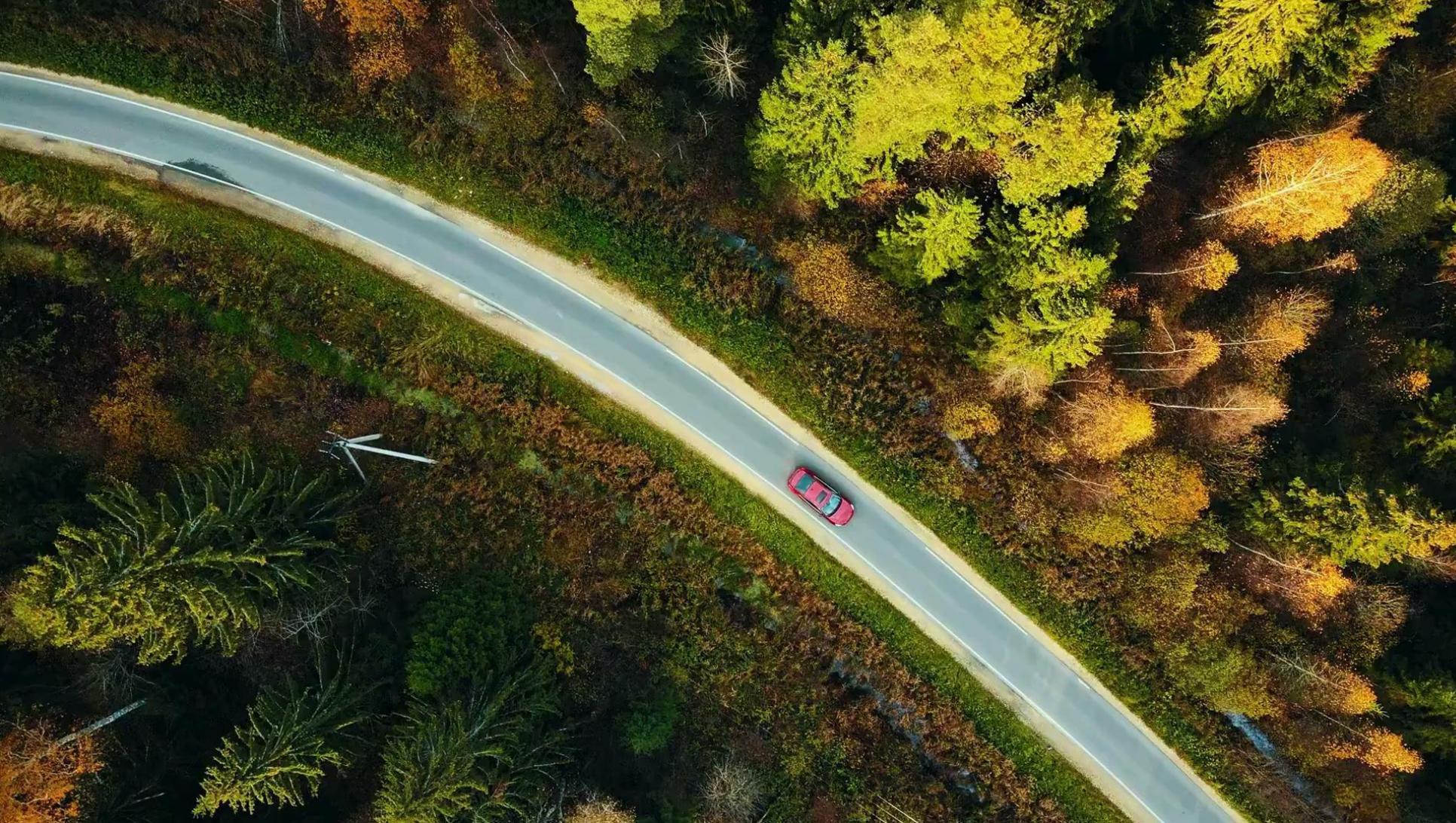
WhippleHill

ADMISSIONSQuest

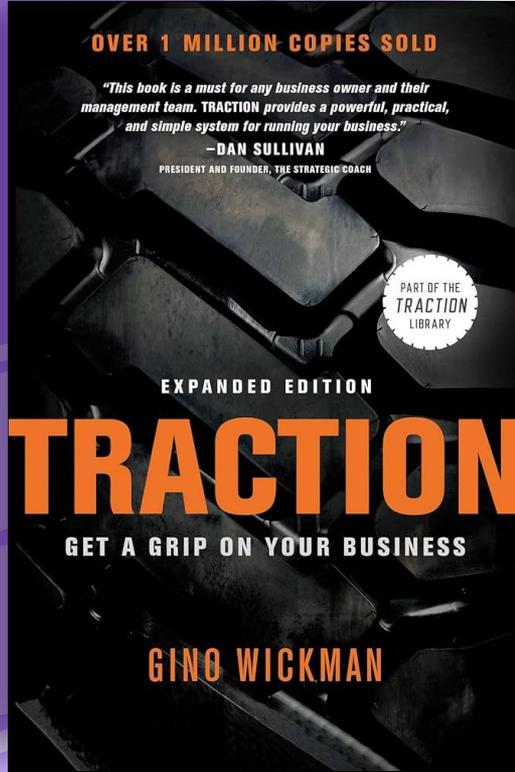edSocial Media

How I support independent schools:

Membership

- **Moonshot Lab** – A professional learning community that helps school leaders build business acumen and innovate their school's business model.

Strategy & Advisory

- **Business Model Retreat** – Map your school's business model, build shared understanding among board and leadership, and identify opportunities for growth.

- **School Operating System (SOS)** – A framework that helps schools turn their strategic plan into action through rhythm, accountability, and measurable progress.

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—DAN SULLIVAN
PRESIDENT AND FOUNDER, THE STRATEGIC COACH

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GET A GRIP ON YOUR BUSINESS

GINO WICKMAN

The Future of the Independent School Business Model

2019

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I've interviews more than 150 heads of school and industry leaders.

Challenged Model

Enrollment Concerns

Hiring & Retention

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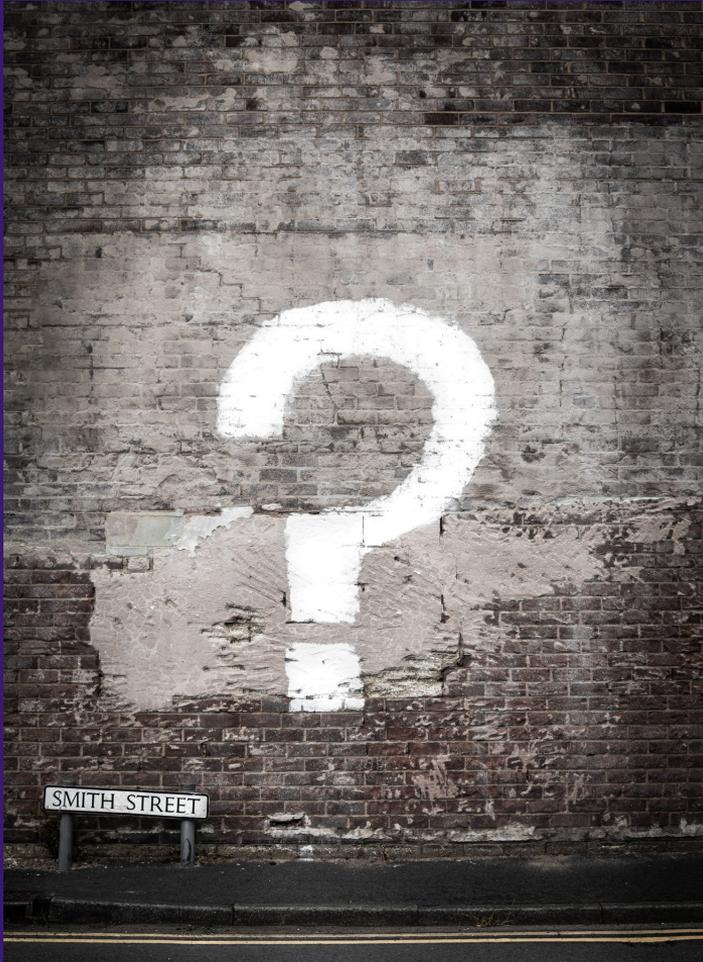
Why are we in this situation?

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"

Peter, people have been saying this model has been challenged for at least 20 years, but yet we're still here.

"

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Hiring and Retention

Rising Costs

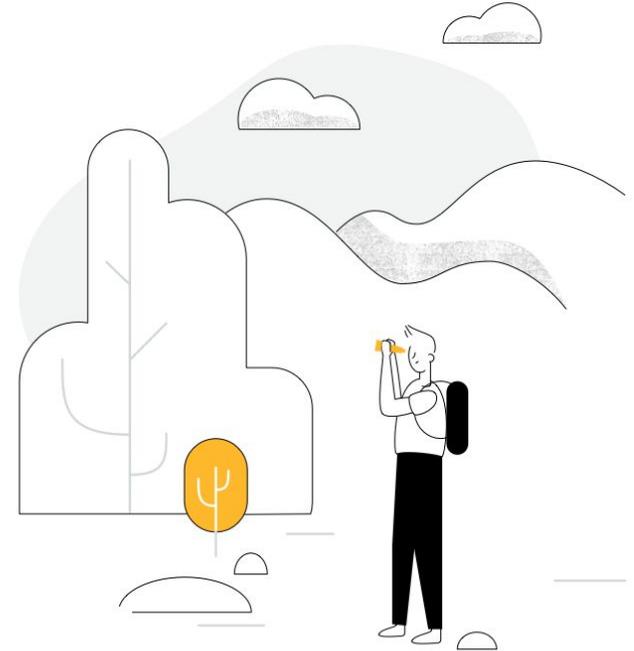**New Generations of Parents**

Circumstances have changed

Declining Birth Rates

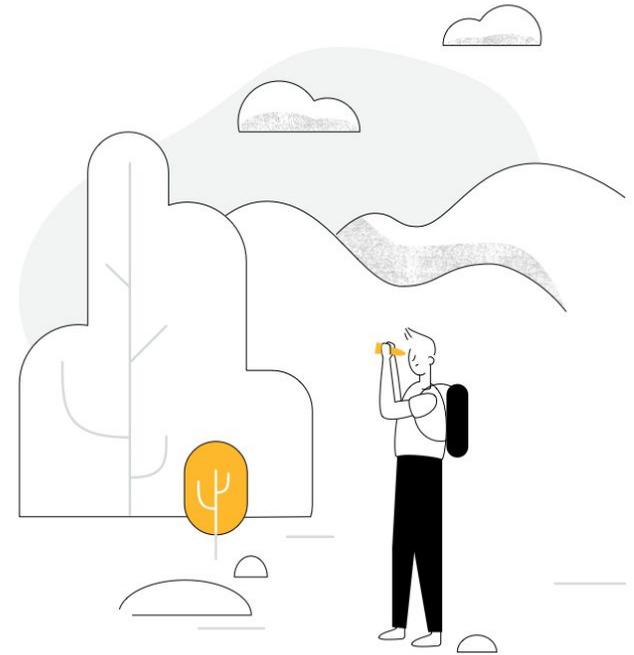**Increased Tuition Discounting**

Uncertain Economy

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Do I have an investment opportunity for you!

Airbnb a Room
13%

Kickstarter
4.5%

Borrow from 401k
9%

Sales
73.5%
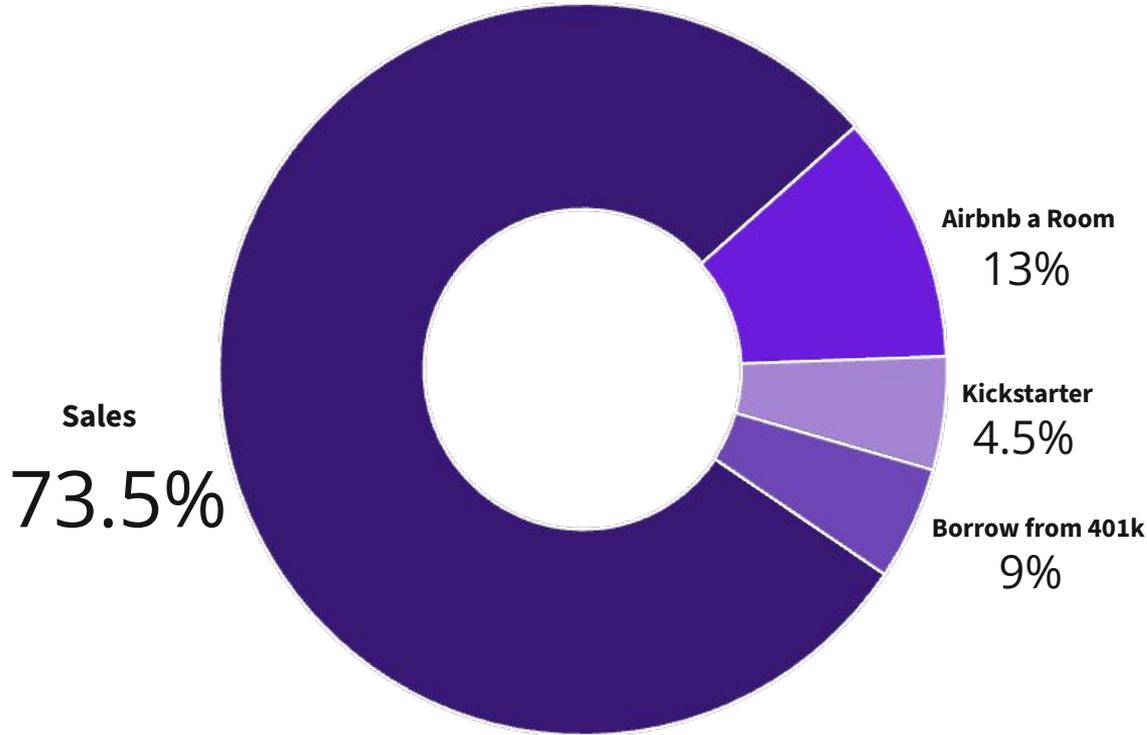
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Independent School Revenue Distribution

SOURCE: NBOA Financial State Of The Industry (Released in 2025)
https://www.nboa.org/publications/research-reports

Auxiliary & Other
13%
(6.3%+6.7%)

Annual Giving
4.5%

Net Tuition & Fees
73.5%

Endowment, Surplus Draw, Interest and Investments
9%
(5.3%+3.7%)
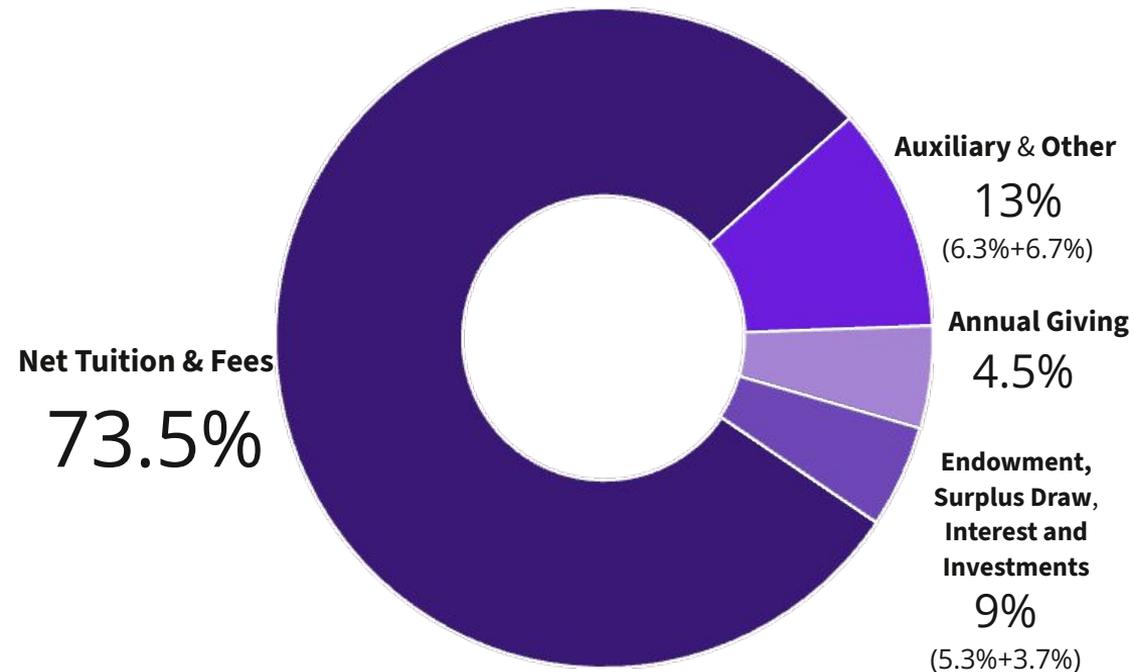
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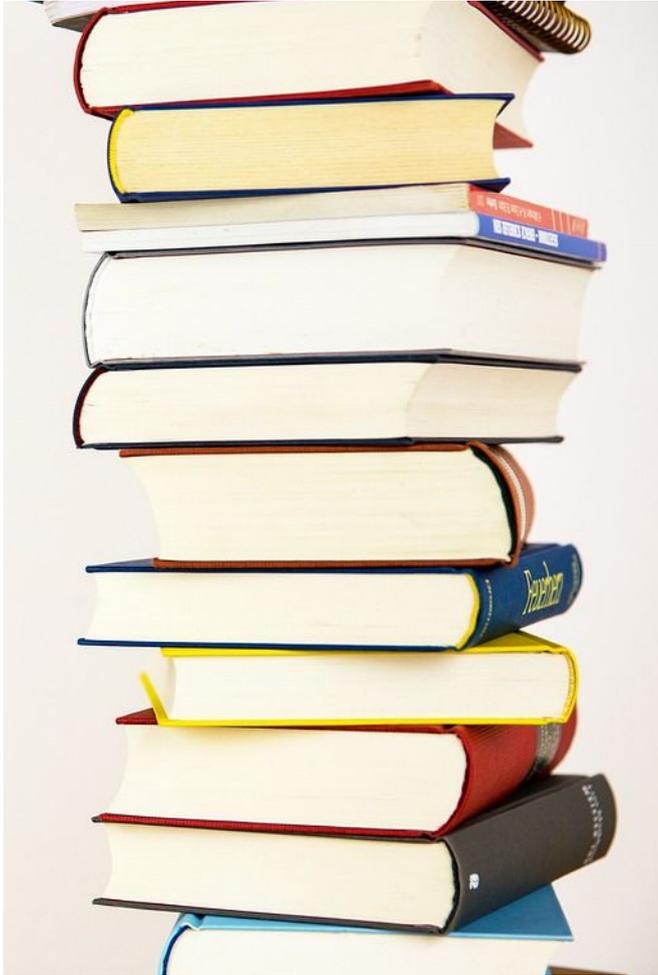
Are we preparing leaders to tackle these challenges?

- Leadership is committed to their organizations.

- They are talented, caring people who want the best for their communities.

- They care deeply about mission.

- But have they universally received **business, entrepreneurial, and systems training?**

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Business Competencies for Independent School Leaders

LEADERSHIP

OPERATIONAL EXCELLENCE

Strategy & Change Management

Culture & People

Entrepreneurial Mindset

Adaptability & Continuous Learning

Financial Acumen & Data Informed Decision Making

Marketing Strategy

Operations

Revenue

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Let's do a check-in:

In the chat, answer one or both:

- **What's one thing that resonated?**

- **What's one question you have?**

Worksheet

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Head of School Strategy Canvas

The independent school environment is shifting fast. Each of the following stressors represents a real pressure facing school leaders today. Use this canvas to diagnose how these forces are impacting your school, and then turn those threats into opportunities.

For each relevant section:
- Describe how this stressor is showing up in your school.
- Identify threats or vulnerabilities.
- Reframe them into opportunities or possible strategic moves.

| Hiring and Retention	
How is the labor market reshaping your ability to attract and keep great people?	
Threats	**Opportunities**
Prompt: Where are we feeling the most pressure in attracting, developing, and keeping great people? What roles or departments are hardest to sustain right now?	Prompt: How could we rethink compensation, culture, or professional growth to become a destination workplace? What would it take to make our school the place where educators want to build their careers?

https://tinyurl.com/hos-workshop

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"You do not rise to the level of your goals. You fall to the level of your systems."

James Clear, *Atomic Habits*

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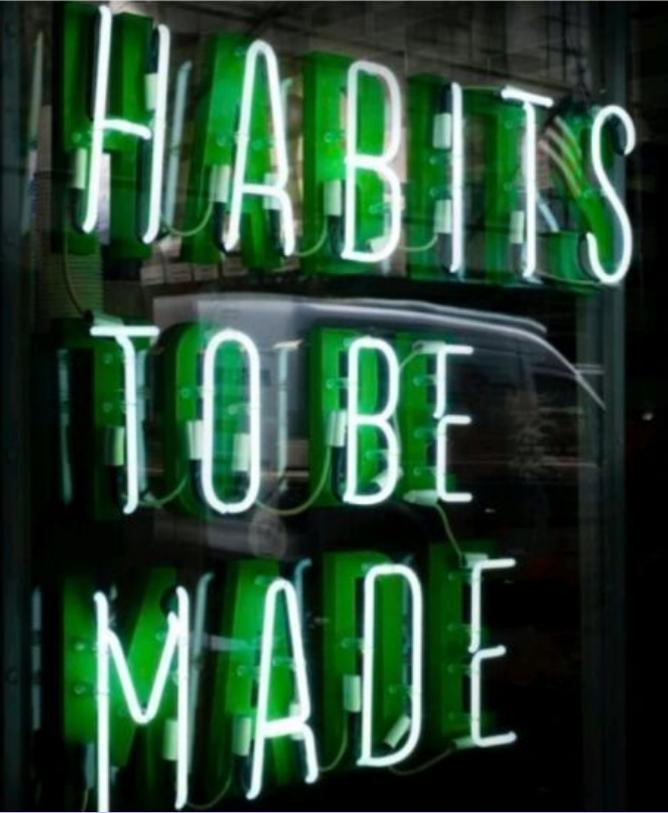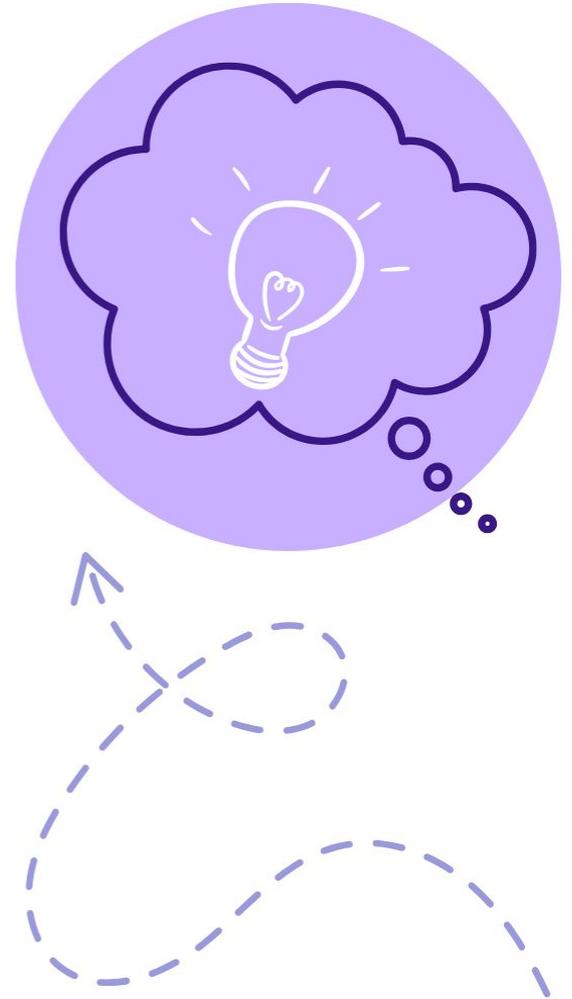
TOP TEAMS

A framework that provides a comprehensive framework for an organization—**transforming your vision and strategy** into **clear actions**, **aligning leadership**, **prioritizing initiatives**, and driving effective daily execution with clarity and confidence.

"We have a strategic plan—how do we actually get it done?"

Let's do some simple math:

5 strategic priorities ×
4 goals × 6 initiatives =

120 new initiatives

On top of everything else you do each day!

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WHERE DO I START?

Let's Talk About Operating Systems

We're all familiar with the operating system (OS) that runs our laptops and phones.

- It's the invisible infrastructure that ensures all the apps and programs work together seamlessly.

- It helps us stay organized, efficient, and productive.

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Just as our phones rely on an OS to function effectively, **organizations** need their own operating system to **align people**, **processes**, and **tools**.

Introducing the School Operating System

A School Operating System is the way a school leaders organizes all of its human energy (& tech, too) — **the way people meet, solve problems, plan, prioritize, follow processes, ideate, communicate, measure, structure, strategize, clarify roles, lead, and manage**.

Every school already has a SOS, is yours **intentional or unintentional?**

SOS powered by **TOP TEAMS**

Every organization has an Operating System, whether they realize it or not.

Unintentional OS

- Evolves over time without a clear plan
- Driven by tradition, personal preferences, or reacting to "shiny objects" that lack strategic alignment
- Results in silos, inefficiencies, and misalignment

Intentional OS

- Deliberately aligns people, processes, and tools with the mission
- Promotes accountability, transparency, and strategic focus
- Offers a clear framework for prioritizing initiatives and allocating resources effectively

Unintentional vs. Intentional

- **Unintentional**: *"Departments operate in silos, reactive decision-making, unclear priorities."*
- **Intentional**: *"Unified goals, clear roles, efficient workflows."*

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School Operating System: Vision to Execution

Long-Term Vision
Define the organization's aspirational 5-10 year goal and intended impact

3-Year Plan
Breakdown the long-term vision into 3-year strategic objectives and initiatives

Annual Plan
Translate 3-year initiatives into achievable, measurable goals for the current year

90-Day Sprints
Break down your annual plan into short, focused cycles to maintain momentum, measure progress, and adapt quickly as needed.

Scorecard
Develop key performance indicators (KPIs) to track progress against annual goals

Meeting Cadence
Establish regular meetings to review scorecards, address issues, and adjust plans as needed

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7 Building Blocks

7 BLOCKS	ELEMENTS
STRATEGY	Clarity of vision and strategic priorities—the foundation of your operating system.
IMPACT	Delivering on your school's value proposition and engaging the community meaningfully.
TEAMS	Strong leadership structure, cultural health, and role clarity across your team.
FLOW	Meeting rhythms and communication practices that keep your team aligned.
FOCUS	Turning strategy into action through 90-day projects and clear execution priorities.
DATA	Tracking the right KPIs to measure progress and guide decisions.
GROWTH	Fostering innovation, learning, and continuous improvement.

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What Are Your Priorities for the Year?

Prioritization Matrix Chart

Quadrant 1:
High Impact / Easy to Implement
(Quick Wins)

Quadrant 2:
High Impact / Hard to Implement
(Major Projects)

5 priorities × 4 goals × 6 initiatives = 120 new initiatives

Quadrant 3:
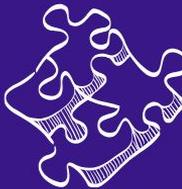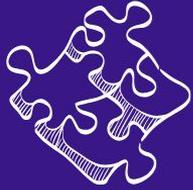Low Impact / Easy to Implement
(Fill-Ins)

Quadrant 4:
Low Impact / Hard to Implement
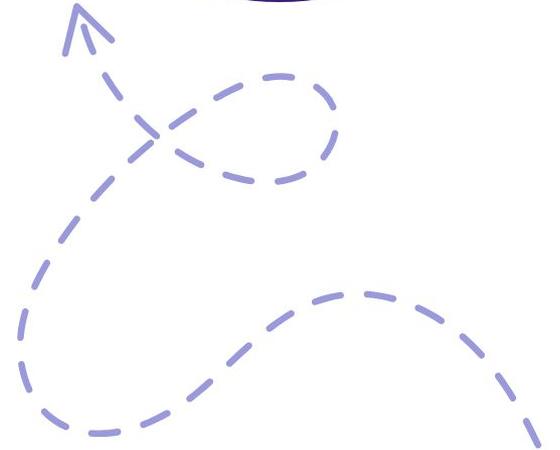(Thankless Tasks)

Break these
goals into
90-day sprints.

The Unlock to a School Operating System:
Your weekly meeting!

Have You Ever Received Formal Meeting Training?

🙌 Raise your hand if you've ever had ***formal training*** on how to run a meeting.

Meeting Agenda: Step-by-Step Guide

1. **Gather (5 min):** Share a personal and professional win from the week.
2. **Headlines (5 min):** Share announcements. Convert any that need deeper discussion into Issues.
3. **Data (5 min):** Review Scorecards at a glance. Celebrate wins and convert underperforming KPIs into Issues.
4. **Projects (5 min):** Check each 90-day project's status. Convert concerns into Issues.
5. **Tasks (5 min):** Review To-Dos from the last meeting. Convert discussion items into Issues.
6. **The List (60 min):** Resolve Issues—problems, opportunities, or ideas.
7. **Wrap (5 min):** Recap next steps, confirm action items, and rate the meeting.

Building Your Flywheel

Vision

Three Year Plan

One Year Plan

90-day Sprint
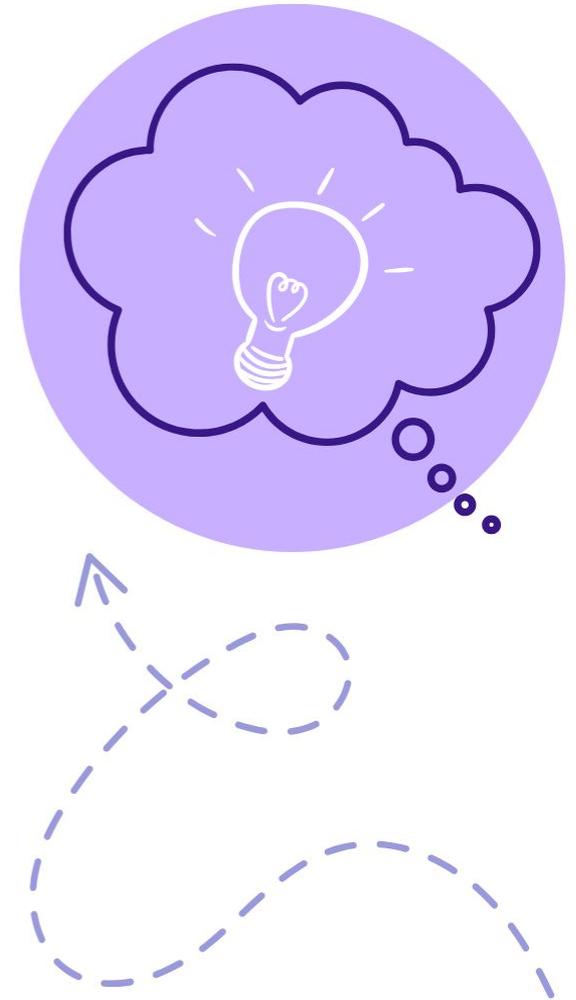
Weekly Meeting

Next Steps

1. Assess your current OS

2. Pilot a structured, weekly meeting and 90-day sprint

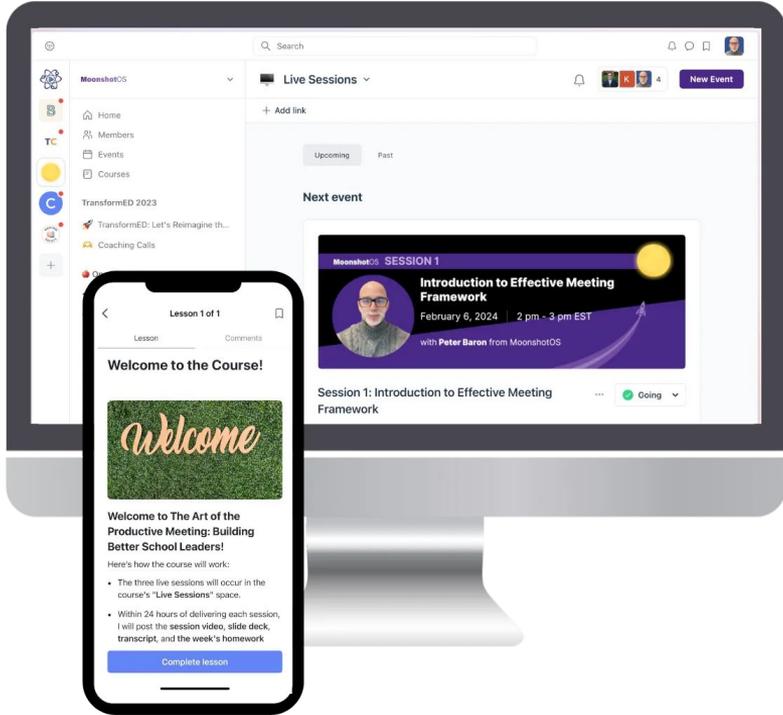3. Measure with scorecards to track real progress

Let's do a check-in:

In the chat, answer one or both:

- What's one thing about the SOS that resonated?

- What's one question you have?

Questions?

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Thank you!

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Let's chat!

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